

**Acquisition Reform
Training Focus Group**

**Final Report
January 30, 1997**

Identifying Major Training Categories & Identifying Training Issues / Tasks

(in random order)

1 COMMERCIAL ACQUISITION PRACTICES

1. Specification Reform

- Writing Performance Work Statements.
- Commercial Item Descriptions.
- Eliminating MILSPECS/Std
- Avoiding targeting a single source
- When are detailed specs appropriate
- Integrate customer/contracting officer in spec writing (team approach)
- Industry feedback in requirements development
- Continuous improvement of spec development

2. What is "Commercial Practices?"

3. Writing Performance Work Statements

4. Acceptance and payment procedures needing to be defined

SF 1449?

DFAS?

5. To include construction

6. Impact on post-award administration

2 DAWIA LEGISLATION

1. funding training for courses outside DAWIA

2. Certification requirements

3. Availability of training

Classroom vs computer based training

4. Multiple certifications

5. Fulfillment program expires 30 Sep 97

6. (related issue) Continuing requirement for 40 hours annual training

7. Best practices

3 SIMPLIFIED ACQUISITION PROCEDURES

1. How to limit number of offerors in SAP

2. How to keep evaluations simplified while obtaining best value

3. Govt purchase card

Thresholds

Training by CBT - computer based training

4. Best Practices

5. Payment i.e. DFAS involvement

4 SOURCE SELECTION PROCESS

1. Debriefings

- What should be disclosed?
- Where should they be held?
- Who should do it?
- Who should be invited?
- When should debriefings be held (pre/post Award)

2. Evaluation Criteria

- What is a key discriminator
- How to write simplified criteria
- How to develop standards
- Should standards be released to offerors
- Writing for best value
- Evaluation Criteria for commercial items
- Full disclosure of criteria

3. Early Contract Administration Services

- why is this in here - why is this under source selection - move somewhere else?

4. Risk assessment

5. Past Performance

- How to treat no performance history
- Degree of relevancy (What is relevant)
- How to gather data
- Access/disclosure to data to offerors
- Accuracy/validity of data
- Weighting of past performance
- Past performance of corporation or personnel/division
- How to deal with merged corporations
- How significant should PP be in evaluation
- How many systems
- How relate PP to other areas (risk factor?)
- NICE JOB GO AIR FORCE
- How do you get consistent and objective ratings of contractor performance
- Should CPAR-type data bases be used

6. Best Value

- What is it?
- How does it relate to Cost as an Independent Variable
- How applied to simplified and micro purchases
- How do a cost/technical tradeoff with no technical proposal

7. Oral Presentation

- When should they be used
- How to document oral presentations (video/live)
- Who should present (paid presenters?)
- How to evaluate oral presentations
- Legal implications of oral presentations

Are oral presentations = oral proposals

How to conduct oral presentations

8. Streamlining

9. Standardizing Process

10. Discussions/negs

- Oral presentations:
- Competitive Range:
- Debriefings:
- Rolling down-select:
- Clarify solicitations:
 - Oral presentations: best use, when appropriate, how to, what to avoid, structure, lack of documentation & impact on contract form
 - Competitive range: determining number of ktrs, past performance & sources of information, ratings.
 - Debriefings & de-selectee recourse to protest.
 - Rolling down-select: what is it? when, where, how?
 - Work more w/contractors to answer their questions about the RFP.
EX: if contractors see conflict & give detail explaining it, then don't dismiss their perception by stating, "RFP is clear as written."
Obviously, it's not clear.

11. Competitive Range Limits

12. Rolling Down-Selects

5 OVERVIEW OF ACQUISITION REFORM

1. ACQ Streamlining

2. New legislation

What are the new initiatives and their status

Summary of recent legislation passed

Means of dissemination (internet, newsletter, formal training)

3. Importance of contract administration post-award

4. DAWIA

5. Benefits of acquisition reform

6 MARKET RESEARCH

1. How is market research accomplished

Training for requirements personnel

Difference between preliminary market research done by user and market research conducted by the contracting officer in developing RFP and market research to identify potential sources

What are the market research techniques?

How do you conduct market research?

What are sources?

How much is enough?
How to write synopses?
Product training (ADP, hi-tech)

2. Who do you go to for help

3. Haven't we always done market research - is this just referring to finding a commercial source so that we would be doing our buy under commercial items FAR
Part 12

7 EARNED VALUE MANAGEMENT

8 MULTIPLE AWARD CONTRACTING

- 1. Task Order/Delivery Order Contracts**
- 2. Share modules already developed - get the word out i.e, amc**
- 3. Train on how to manage fair opportunity vs self direct under award**
- 4. Teach as an element within performance measurement**
- 5. Cost as an independent variable**

9 EC/EDI

- 1. FACNET**
- 2. Centralized contractor registration**
- 3. Tell us status of fixing - will this all go on Internet & no more FACNET**
- 4. FACNET alternatives**
- 5. Connectivity/access issues to internet**
- 6. Security issues**
- 7. What it does for PM today**

10 COST/PRICE ANALYSIS

- 1. Cost as an Independent Variable**
Define what it is and how it is used
- 2. Use of cost and pricing data**

11 FLEXIBLE FUNDING

- 1. Teach us what it is & how we use**
- 2. Is this appropriations or contractor financing**
 - Antideficiency Act training
 - What is a bonafide need?
 - What is incremental funding
 - Types of funds and application
 - Multiyear vs multiple year contracts

What is the Economy Act and how does it work

12 CONTRACT FINANCING

1. Risk assessment

How to use as decision making tool

2. Commercial item financing

3. Performance based payments

4. Commercial Payments

What is collateral, personal property? How to verify

13 A.R. TRAINING FOR NON-KTG PERSONNEL

1. Contract administration

2. Program management

3. Market research

14 PROGRAM MANAGEMENT TRAINING

1. Add acquisition reform up to date with the Defense Acq University.

2. Contracting courses need to be updated with Acq Reform lessons.

3. Service contracts are not the same as products teach this.

4. Service contracts need more emphasis to grow to same level as product side.

43 % of available dollars in DoD are now spent in this arena with the potential for additional growth. Many Service Contract Managers are not taught with the same intensity as the Product Program Managers (ex. B-2 airplane versus Base support contract.)

15 PROTEST PROCEDURES

1. Ways to prevent protest!

2. Actions while protest on-going.

3. Alternate Dispute Resolution

4. Protest procedures--constraints, timelines, causes.

5. Follow-up actions after protest is resolved.

6. Lessons learned--best practices

16 ALTERNATIVES TO CLASSROOM TRAINING

1. Computer based training (CBT)

2. Correspondence training

3. Video teleconferencing/satellite feed

4. Fulfillment/waivers

5. put all training materials & best practices on Internet

6. Available to any self motivated person without great personal expense

17 REQUIREMENTS DEVELOPMENT

1. Performance Based Contracting

Training on specific performance criteria or milestones

Non-routine services

2. Identification of Stakeholder

3. Early Industry Involvement

Select vendor early in process and involve in requirement analysis -

Incremental development processes or rapid development method (rdm)

This is referenced in itmra

Mentor/protege program

4. "Corporate" Buy-In

User-lead IPTs with SPO/Contractor Involvement, can lead to Service level Board, to JROC

OR, Petty Officer that needs the widget

5. Balance requirements with Cost/Utility/Risk

6. Weapon System Milestone Timelines

7. Early involvement of procurement/legal personnel

8. Senior management support -- source of empowerment

9. Customer/user involvement in requirements analysis

18 INTRAAGENCY TEAMING (INTEGRATED, FORMAL, INFORMAL) - FORMATION (STAKEHOLDERS TOGETHER AT ONE TIME)

1. Customer Service

2. Program managers cooperation with PCO/ACO and vice versa

3. Behavior modification/consensus training

4. Rules of the road /communication skills training

5. Cultures changes on a team your all equally empowered

6. Management training to respect the decision authority of team

7. Just in time training delivered to the teams

19 DELETE: THIS IS METHOD, NOT TRAINING AREA. CASE STUDIES/LESSONS LEARNED

1. Templates & samples for working level personnel

co

2. Overarching category

20 LIMITATIONS OF REENGINEERING

1. Training on actual limitations:

Statutory, departmental, agency, office policy, how dfas works

21 PARTNERING WITH INDUSTRY (EARLY INDUSTRY INVOLVEMENT; NEGOTIATION TECHNIQUES/PARTNERING; EVOLVE PARTNERING)

1. Communication between requirements--ktg--kt admin

Don't believe this involves industry, but is within the presolicitation through award process in-house (group 4)

2. Training needs for partnering

CULTURE CHANGE!

- get rid of the adversarial attitudes

- shift qa focus from finding fault to getting the customer what they want

- when to use, how to use (techniques), ethics when working w/ multiple industry partners

- maintain open forum after-award w/de-selects to be involved w/industry changes

- attend DAWIA classes together? Other training?

- instill incentives for outstanding performance (especially with undefined scopes): define what outstanding (better, faster, cheaper), and work with contractor to achieve; have contracting officer insure DCAA is one of the partner.

- benchmarking: capture contractor's performance results, & make available across gov't lines

- emphasize results, not busy-ness; less red-tape

- empower by emphasizing that the regs are GUIDES, except for statutory requirements

- encourage early industry involvement: give program managers authority to discuss with industry during requirements development/ market survey prior to using draft rfp

- meet with contractors to discuss performance evaluation, and allow their comments before establishing final evaluation that will be used for past performance reviews.

3. Lessons learned/success stories

4. Increased vigilance necessary in the partnering environment

22 EMPOWERMENT /BREAKING THE PARADIGM

1. Retrain managers/supervisors with antiquated management and technical skills

2. Train employees to utilize empowerment skills

3. Performance measurement

23 MICROPURCHASES

1. Purchase Card

2. This needs to be moved to Simplified Acquisition Procedures

24 ALTERNATIVE DISPUTE RESOLUTION

1. When to use it

2. How to use it

3. Why to use it

25 PRE QUALIFICATION OF OFFERORS

- 1. Needs to be moved to Source Selection**
- 2. Past Performance Evaluation**
- 3. Market Research/Life Cycle Cost Assessment**

26 TOTAL SYSTEM PERFORMANCE RESPONSIBILITY

- 1. Not part of Acquisition Reform;delete**
- 2. interoperability standards**
- 3. As we reform the DoD, many activities are moving from DoD to major contractors. People need to understand what Total System Performance Responsibility is. It means the contractor has the lead to develop systems not the government. The contractor is responsible for delivering the product on time, with proper performance and within cost. The contractor uses more of their leeway to make decisions versus asking for government okay. Thus, program managers are not as involved as they use to be. We also don't have the 300 person program offices. Now the typical program office will have only 50 personnel. TSPR means less oversight and more insight.**

27 EVALUATION OF HOW TO IMPLEMENT CHANGE (PROCESSES TO EVAL)

- 1. Retraining Management**
- 2. Dealing with Change (Management)**
Training to deal with the culture of change
- 3. Move to empowerment training**

28 INFORMATION TECHNOLOGY ACQUISITION TRAINING

- 1. Information Technology Management Resources Act**
Documentation requirements
- 2. Changes in Federal Information Processing**
- 3. Approval authorities**
- 4. Why is information resources training necessary/what's important**

29 CENTRALIZED TRAINING ORGANIZATION FOR DOD AND ALL FEDERAL AGENCIES

- 1. Process Training - meeting the mission (total)**
- 2. Educating us how to use the available Tech Systems**
- 3. A-76 (OMB circular) training**
- 4. Group Training with Contractors**
- 5. What is required by law/legislation**
How do you satisfy that requirement
- 6. Funding**

30 AUDIT RESOLUTION

- 1. DCAA cooperation w/ACO**
- 2. Reducing timelines**

31 STREAMLINING ACQUISITION REPORTING

- 1. Metrics reporting process**
- 2. DOD 5000 series**

32 PROPERTY

- 1. Reduction in government furnished property**
- 2. Inventory accountability**
- 3. Disposition of excess property**

33 CONTRACT CLOSE OUT

- 1. Close-Out Procedures**
- 2. Quick Close-Out Procedures**
- 3. Expiring Funds**
- 4. Excess Property**
- 5. Parts Obsolescence**
- 6. Excess Funds Disposition**
 - Teach as an element within performance measurement

Prioritize Training Categories

Participant Instructions

Identify those categories that are most important for training to ensure your future ability to perform the acquisition function.

Voting Results

Multiple Selection (maximum choices = 15) (Allow bypass)

Number of ballot items: 36

Total number of voters (N): 7

Total

6	1. Simplified acquisition procedures
6	2. Source Selection Process
6	3. Multiple award contracting
6	4. Commercial acquisition practices
5	5. Market research
5	6. Requirements development
4	7. Partnering with Industry
4	8. EDI/EC
4	9. Cost/Price analysis
4	10. Ar training for non-ktg personnel
3	11. Alternatives to classroom training
3	12. Empowerment /Breaking the Paradigm
3	13. Alternative Dispute Resolution
3	14. Pre qualification of offerors
3	15. Information Technology Acquisition Training
3	16. Property
2	17. Protest procedures
2	18. Contract financing
2	19. Intraagency Teaming (Integrated, Formal, Informal) - Formation (Stakeholders together at one time))
2	20. Discussions/negs
2	21. Micropurchases
2	22. Centralized Training Organization for DOD and all Federal agencies
2	23. Contract Close Out
1	24. Program Management Training
1	25. Flexible funding
1	26. Earned Value Management -
1	27. Overview of Acquisition Reform (Delete)
1	28. Delete: this is method, not training area. Case Studies/lessons Learned

1	29. Rolling down-selects
1	30. DAWIA Legislation
1	31. Evaluation of how to implement change (Processes to eval)
0	32. Combine w/ item 35. competitive range limits
0	33. Limitations of Reengineering
0	34. Total System Performance Responsibility
0	35. Audit resolution
0	36. Streamlining Acquisition Reporting

Ballot Items in Original Order

1. Commercial Acquisition Practices

Specification Reform

2. DAWIA Legislation

funding training for courses outside DAWIA

3. Simplified Acquisition Procedures

4. Source Selection Process

Debriefings

Evaluation Criteria

Early Contract Administration Services

Risk Assessment

Past Performance

Best Value

Oral Presentation

5. Overview of Acquisition Reform (Delete)

ACQ STREAMLINING

New legislation

6. MARKET RESEARCH

7. Earned Value Management -

8. Multiple award contracting

Task Order/Delivery Order Contracts

9. EDI/EC

FACNET

10. Cost/Price analysis

Cost as an Independent Variable

Use of cost and pricing data

11. Flexible Funding

12. Contract Financing

13. Ar Training For Non-Ktg Personnel

14. Program Management Training

15. Protest Procedures

16. Alternatives To Classroom Training

17. Requirements Development

Performance Based Contracting

18. IntraAgency Teaming (Integrated, Formal, Informal) - Formation (Stakeholders together at one time))

Customer Service Move to 27

19. Delete: This Is Method, Not Training Area.

Case Studies/Lessons Learned

Templates & Samples For Working Level Personnel

20. Discussions/Negs

21. Combine W/ Item 35.

Competitive Range Limits

22. Rolling Down-Selects

23. Limitations of Reengineering

24. Partnering with Industry

Early Industry Involvement

Communication Between Requirements--Ktg--Kt Admin

Negotiation Techniques/Partnering

Evolve Partnering!

25. Empowerment /Breaking the Paradigm

26. MICROPURCHASES

Purchase Card

27. Alternative Dispute Resolution

28. Pre Qualification Of Offerors

29. Total System Performance Responsibility

30. Evaluation of how to implement change (Processes to eval)

Retraining Management

Dealing with Change (Management)

31. Information Technology Acquisition Training

Information Technology Management Resources Act

Changes in Federal Information Processing

32. Centralized Training Organization for DOD and all Federal agencies

Process Training - meeting the mission (total)

Educating us how to use the available Tech Systems

A-76 (OMB circular) training

Group Training with Contractors

33. Audit Resolution

34. Streamlining Acquisition Reporting

35. Property

36. Contract Close Out

Close-Out Procedures